A Workbook For Community Planning

Helping communities work together to help newcomers

Prepared for Citizenship and Immigration Canada

by Valerie Gruno and Susan Stovel

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INTRODUCTION

Why this workbook?

As part of the Settlement Renewal initiative, Citizenship and Immigration Canada (CIC) signalled that local communities should have a role in planning and setting priorities for settlement services. In anticipation of a new approach to the administration of settlement services, CIC commissioned the authors, Valerie Gruno and Susan Stovel, to develop a workbook that would help communities to get involved in the planning process and give funders specific recommendations about priorities. The intention was to provide a tool that would help those involved in settlement issues (i.e., education, health, social services, settlement agencies, and so on) to monitor the arrival of newcomers and their evolving settlement needs and to sort out the relative priorities for funding within their community.

How was it created?

The authors worked with over seventy advisors from across Canada to develop this resource. Their names are found in Appendix D. The advisors came from a variety of community organizations and sectors, including settlement services and language training organizations, all levels of government, other funders, the education and health sectors, social planning and community development. These advisors indicated that, in order to be successful, the workbook would need to go beyond setting priorities for funding and:

- help communities make plans for dealing with a crisis and/or emerging settlement issues.
- broaden awareness of settlement issues in the community and promote action by other sectors.
- allow communities to implement a planning process without additional resources and outside experts.
- avoid creating another structure, bureaucracy or elite group.
- recognize that potential users of the workbook have a variety of planning experiences.
- apply to a variety of diverse communities that would want to use it.
- be practical enough to support everyday work.
- help participants focus on taking action and enable them to move beyond past histories and habits which might get in the way of effective planning processes.
- use clear language and be easy to read.
- have a format that allows communities to adapt the tools and strategies to their particular situation.

Who is it for?

This workbook is designed for communities that regularly receive immigrants and refugees from other countries (newcomers). Organizations that serve newcomers as they arrive and start to settle in a community—such as municipal governments, school districts, non-profit community agencies, recreation centres, health departments and employment centres, together with the agencies who provide direct settlement services—are key to helping newcomers settle effectively. If a community takes early

strategic actions, these actions can make an immeasurable difference to a newcomer's initial settlement in Canada and greatly reduce the human cost to individual newcomers and their families. They will also decrease the greater costs to society, not only in terms of providing language training, social assistance or other support services, but also in the sense of creating a community for new immigrants.

How to use the workbook

The workbook will take a group step-by-step through the planning process. It uses a number of methods—case studies, checklists, group decision-making exercises and specific tools and strategies—to make the planning process as practical as possible. A number of appendices supplement the strategies in the body of the workbook. The strategies have all been tested in the field or have been assessed by a number of people with experience in planning at the community level.

You can do it!

The advisors who helped to develop this workbook wanted to encourage communities to realize that they too could start, or participate in, a planning process. They believe that everyone, from the smallest agency to the most experienced community planning group, can reach their goals by using the processes and tools in this workbook and by seeking help from others in their community. A variety of people who have experienced both successful and unsuccessful planning processes have offered various suggestions for overcoming common problems.

The workbook uses the principles of community development to help you to implement your own planning processes in your own way.

GETTING STARTED

Why plan?

We all know that planning requires time and effort. We also know that the process will not be worthwhile for all participants unless it results in concrete recommendations and actions. In order to avoid confusion and wasted energies on discussions and activities that lack focus, all participants need to understand and agree on the initial reasons for starting a planning process. Of course changes will occur as the process evolves or more information is gathered, but the underlying main goals of the exercise need to remain in place to guide the planning process and the resulting action plans. In addition, if you are clear about why you want to plan, it will be easier to attract others to participate in the process.

There are many reasons why a community may begin a planning process. You may find that one or more of the following reasons fits your situation—or you can fill in your own reason at the end of the list.

- Funders have asked you to initiate a planning process to identify priorities and increase effectiveness within settlement.
- You are experiencing an increased demand for services and have fewer resources to work with.
- You have to make difficult trade-offs in order to tackle changing priority issues.
- A major issue or crisis has arisen in the community.
- Settlement issues are increasing in complexity, and one or more organizations believes that more planning will ensure better results for newcomers.
- You perceive an increased need for advocacy and a greater community awareness concerning settlement issues.

What is happening in your community? Why do you want to plan? List your reasons.

This workbook uses two case studies to illustrate workable approaches to a multi-sectoral community planning process. The following examples from those case studies have been adapted from "real-life" situations and represent different starting points for the planning process. In one example, the process was triggered by a funder's request for a broad-based settlement planning process; in the other, a crisis in the community triggered the process.

Case Study 1

A funder requests a broad-based planning approach as the basis for future funding of settlement services. Two settlement services agencies and a neighbourhood house meet and, despite some historical difficulties, agree to work together to identify funding priorities and other issues important to their organizations.

Case Study 2

A school counsellor is concerned because immigrant youth are dropping out of school in large numbers. She takes her concern to the principal and then to the school board. A group forms to try and deal with this issue, including a teacher, a principal, a school board

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GETTING OTHERS INVOLVED

After you have established your goals, the next step is to decide who else needs to be involved. This will depend on what you want to achieve. It is important to include everyone who could have a role in taking action. People spoke to us about the frustration of being asked to change their programs or ways of working when they had not been involved in the process of arriving at the decisions. As well, participation in developing solutions increases the commitment to achieving the desired results. Widening your circle to include new partners, especially from sectors who do not normally work together, expands the range of possible solutions and builds a greater sense of community around newcomer issues.

The following *trigger questions* could help you decide who should be involved in the planning process.

- What organizations, in addition to settlement agencies, need to be prepared to take action in order to address newcomer issues?
- How will newcomers be represented?
- Who in the community is likely to be involved with newcomers when they first arrive in Canada?
- What other sectors in the community need to grow in knowledge or expertise around dealing with newcomer issues?
- Are there government departments or other funders who need to be involved?
- Who will benefit from the actions taken as a result of the planning process?

The people involved in our two case studies identified the following participants as essential to achieving their goals.

Case Study 1

ESL organizations, employment centre, Volunteer Bureau, Parks and Recreation Department, Ministry of Skills, Training and Labour, school board, cultural association, United Way, mental health unit

Case Study 2

Parents, teachers, guidance counsellor, principal, school board member, settlement agency, recreation centre director, local reporter, students (including two drop-out students), employment counsellor, two provincial ministry representatives.

Who do we need to involve to achieve our goals?

Organization*	Contact Person	Phone/Fax/Address

*People in the community spoke about the importance of bringing in new partners and ensuring participation by a wide diversity of organizations in order to reach the best solutions.

In larger communities, you may need to involve fifty or more organizations in a planning process. Appendix A outlines a suggested approach that communities have used when large numbers of people wanted to be involved in planning. You may know of other successful ways to be inclusive and practical when dealing with large numbers of potential participants.

Inviting the participants

Once you have drawn up a list of potential participating organizations based on the goals of the planning process, the next step is to invite them to participate. If at all possible, make the invitation through personal contact with individuals in order to produce better results. The invitation needs to *motivate potential participants* and ensure that those invited:

- know why their organization is needed for the planning process and
- how their organization might benefit.

Appendix B contains sample guides to written or personal invitations. These guides include questions about the level of commitment to participate because this is useful information for planning purposes.

This is also the time to identify possible barriers to participation. Depending on previous experiences, you may need to take some other steps. The following are suggestions for becoming more inclusive and increasing participation.

- Have an influential person invite the organization directly.
- If an organization has not participated in settlement issues in the past, you might hold an earlier meeting to sensitize the participants to the newcomer realities that affect their work.
- Hold small focus groups in other languages and ask a representative of each group to attend the larger meeting to present the group's viewpoint.
- Announce the meeting in the newspaper or other local media.
- Attend other organizations' meetings and encourage them to participate.

An important part of involving others in the planning process is deciding on the role of funders and your relationship with them. They should be invited at the same time as community organizations. Funders have a major influence on the direction and results of settlement initiatives at the community level through their funding criteria, their dollar allocations and their big picture perspective. Community advisors stressed the importance of getting the funder's commitment and support for the process in order to avoid the potential for a great deal of wasted effort.

Funders spoke about the importance of working in collaboration with communities and being role models for the partnerships they are encouraging. Funders also stressed that they are often restricted by allotted channels of funding within their organizations. In addition, communities are asking funders to participate in community development processes, and some staff may not have these skills. Knowing and understanding these limitations is important to successful planning.

Meeting together

At some point, various community organizations, individuals, government representatives and other funders will have agreed to begin a multi-sectoral planning process. When this happens, it is important to focus on concrete actions and make the most of meetings because everyone's time is limited. Moving forward quickly also keeps participants committed to the process. People made the following suggestions related to the atmosphere and organization of meetings.

- Choose meeting locations that will feel neutral and safe to participants.
- Consider access issues for participants, such as daycare, transportation, meeting time, availability of translation.
- Provide food to encourage participation.
- Create a meeting atmosphere that respects the needs of all the participants and that will make them feel comfortable.

- Ensure that everyone shares the decisions and the workload, that all participants have a chance to speak and that all processes are open.
- Have a focused agenda and commit to working on tasks between the meetings in order to move forward.

First meetings

The first meetings can be important steps to building new relationships, developing understanding and commitment, and sharing the ownership and workload. The purpose of these meetings is to reach agreement on a process for action on settlement issues. Therefore the initial gathering needs to reflect how the entire planning process will proceed. The process should be based upon answers to the following questions.

- What do we need to know before we can take action?
- How will we get the information?
- Who has the necessary expertise and can be our resource in the community?
- What are reasonable time lines for reporting back?
- What actions will we take as a result of the information we collect?

Understanding the overall planning process and deciding what tasks various participants will take on may require a few meetings. One way to save time at the first meeting would be to send this workbook, or relevant sections of it, to participants so they can read it in advance and think about how they could participate in gathering information. Valuing participants' time means moving to action and not getting stalled in endless discussions that do not move the group forward. Using the following sections of the workbook will help to keep the group focused.

WHAT DO YOU NEED TO KNOW?

You can use the communty-based expertise and experience you have attracted to your group to help collect the information you need to establish a context for planning and action in the communty. According to advisors in the community, using a collaborative community information-gathering process like the one described here is preferable to conducting formal research. The objective is not to do an in-depth needs assessment but rather to create a "snapshot" in time that can serve as a framework for developing an action plan. This approach makes sense in relation to the working realities at the community level, where the process of gathering information needs to be relatively straightforward and flexible enough to adapt to the ever-evolving immigrant situations within each community.

This section of the workbook describes a number of possible ways of gathering the kind of information needed to establish the context for planning and action. The key is to seek input from diverse sources. Reaching a wide variety of people and soliciting opinions in a number of different ways will strengthen the validity of the results, increase awareness regarding settlement issues, and build more community connections.

Finding out what newcomers are experiencing

Communities need to obtain information directly from a wide variety of newcomers because newcomers are the ones experiencing the issues and their input is essential to implementing effective actions. Despite good intentions, communities often miss this important step. There are two main issues here—how to reach newcomers and how to find out what their issues are.

Getting information directly from newcomers

1. Questionnaires

This workbook is not able to provide an in-depth discussion on designing a questionnaire; that information is available in a number of other resources. However, the process of developing a questionnaire often causes some concern, and the following suggestions may be helpful.

- Have people from the target group help develop the wording and content of the questions so that everyone will be able to understand them easily.
- Use open-ended questions as much as possible rather than a checklist format; open-ended questions will give you a wide range of responses and lessen the possibility of bias.
- Use as few questions as possible to ensure a better response rate and a focused enquiry.
- State the questions in clear, simple and straightforward language (no jargon).

We developed the following sample open-ended questionnaire in consultation with both newcomers and settlement service providers in order to ensure

that the wording of the questions was understandable and that the questions would capture the whole range of newcomer experiences. Over 400 newcomers in British Columbia answered the questionnaire through guided focus group discussions, interviews with front-line workers, newcomer networks, ESL classes and other avenues. The wide range of responses confirmed the value of open-ended questions. The analysis was also less difficult than expected, and clear priorities for settlement quickly emerged, along with identification of future actions.

Sample Questionnaire

Case Study 1

- *Representatives from three ESL organizations, the employment centre, the Volunteer Bureau, the Parks and Recreation Department, the Ministry of Skills, Training and Labour, the school board, a cultural association, the United Way, and the mental health unit agreed to have their front-line workers ask ten newcomers to complete the questionnaire and provide any assistance that was required.*
- *Three organizations held focus group sessions using the open-ended questionnaire to focus discussions and obtain individual or collective answers.*

Case Study 2

- *Two teachers, a high school guidance counsellor, a principal, a settlement agency youth worker, a recreation director, a cultural leader, and five students agreed to reach six students each to answer a questionnaire (four drop-out students and two from within the same immigrant community who had not dropped out).*
- *Two students from different schools volunteered to run a noon-hour discussion group based upon the questionnaire.*
- *The settlement agency youth worker undertook to reach at least eight drop-out students at their local hang-out where he had already developed a trusting relationship with three of them.*
- *The employment counsellor, who regularly sees the students who have dropped out, agreed to add the questionnaire to his initial information-gathering.*

To organizations outside the settlement sector, the barriers of language and culture may seem insurmountable. However, experience shows that many of these organizations have front-line workers, program coordinators, or newcomers on staff who feel comfortable in connecting with a small number of newcomers to complete a questionnaire, conduct a personal interview, or facilitate a focus group. In other instances, people have used peer, family or "buddy" translators, and this has worked well. There are many resources available on the pros and cons of different survey methods, but the people we talked to emphasized that the survey method does not have to be difficult or time consuming in order for the information to be usable for planning.

In fact, data collection has to be fairly simple and economical if it is to be a regular part of settlement work rather than a one-time expensive study. If each organization is asking only a few questions of approximately ten newcomers, they could question people individually or conduct the surveys in a group setting such as an ESL class or a community program. If the newcomers are able to read and write adequately, they could either fill out the questionnaire themselves or participate in a focus group or one-on-one interview. Interviews and focus group discussions provide more in-depth information and understanding of the main issues and are useful for supplementing written answers. The facilitator also has the opportunity to answer questions and clarify certain points. However, these situations contain the risk of bias, and if the interviews take place in a group setting, dominant members of the group may influence the outcome. The person gathering or recording the information needs to be unbiased and committed to getting accurate results. In some cases, translators will need to be involved.

Everyone involved needs to believe in the results of such a process. Once everyone has agreed on a plan for reaching newcomers, the people in the planning group should all ask themselves, "Will I accept the results as valid if we reach this many newcomers and use these particular processes to gather the information?"

How will we reach newcomers?

Name of Organization or Person	Number of Newcomers	Questionnaire, Focus Group, or One-on-One Interview

Finding out what trends are important

Having up-to-date information on immigration trends in the community is helpful as a means of supplementing program data and information obtained directly from newcomers. Using the information on trends to create a comprehensive overview of immigration in the community will set the stage for better planning and priority setting. (Appendix C lists contacts for all of the data sources in this section of the workbook.)

There are many sources of data you can use to identify trends in your community, and they all have limitations as well as benefits.

- Information from Statistics Canada is based on the Canada-wide census which occurs every five years. The latest data collection period ended in 1996. All of the data from the 1996 census is scheduled for release by June, 1998, with the first data on immigration at the national, provincial and large metropolitan area levels released in November, 1997. Statistics Canada produces publications which are available at Regional Reference Centres or designated (Depository) libraries. Local libraries may carry some of these publications. All data products can be purchased directly through Statistics Canada offices. Their 1-800 phone number is listed in the blue pages of the phone book. Statistics Canada also has a website (www.statcan.ca) which includes lists of publications and various statistical tables. The 1996 Census publications will contain detailed tables at the national, provincial and major metropolitan levels. Tables for smaller geographic areas will be available for purchase. Contact a Regional Reference Centre with your specifications to obtain a cost estimate.
- Citizenship and Immigration Canada (CIC) can supply monthly statistics on immigrant and refugee landings, together with a variety of demographic information. There are recognized problems in the accuracy of landing data because the addresses newcomers give on arrival in Canada may only be temporary, and the information is based on their *intended* destination and occupation. However, in larger geographic areas, the landing and census data compare very closely, and the discrepancies are minor. Landing data can help to determine trends in the community. There are many areas of information within the landing data, including age, gender, immigrant class or category, occupation, official or native language, educational qualifications, marital status and last permanent residence. CIC charges a fee for retrieving data relevant to a particular community, so any request should be very specific. In addition, the Public Affairs section of CIC makes publications on various immigration topics available to the public. Provinces such as British Columbia use the landing data from CIC to create profiles for their own immigrant population and to publish regular publications that are available to the public.
- Four Canadian *Centres of Excellence* have been established in Vancouver, Edmonton, Toronto and Montreal to study immigration and integration under the Metropolis Project, an international initiative for examining the impact of immigration on cities around the world. Each of the four centres represents a consortium of universities and all have a wide variety of partners in the community. The Centre of Excellence in Vancouver is a partnership of the University of British Columbia, Simon Fraser University, and the University of Victoria. The Centre in Edmonton has a team of researchers from the universities of Alberta, Saskatchewan, Manitoba, Calgary, Regina and Winnipeg. The Centre in Toronto includes Ryerson Polytechnic University, the University of Toronto and York University. The Université de Montreal, McGill University and the Institut national de recherche scientifique-urbanization have combined to form the Montreal Centre of Excellence. Planning groups working in communities that are linked to the Metropolis Project might be able to acquire relevant and timely information from a Centre of Excellence.
- You can get local information related to immigration trends or to student enrollment in ESL, for example, from social planning organizations, municipal governments or school

Which organizations will summarize their experiences with newcomers?

Name of Organization	Question(s) to be Asked

Information from funders

In order to establish a realistic context for future actions, community planning groups also need information from relevant funders. The following are some suggested questions to ask funders.

- Are you able to share information that would help the group to plan: for example, on your organization's priorities, strategic planning, or funding allocations?
- Do you have immigration data that would be useful in this planning process?
- Are you able to adapt funding criteria if the planning process results in, for example, new ways of working or collaboration among organizations?
- Do you have any relevant research that would be useful in the planning process?

Information about the participation of newcomers in the community

Information about newcomers in a community is often available from a number of sources. Information from these sources can give the planning group a picture of the way newcomers are participating in the community. The following are some suggestions for additional sources of information.

- Local schools have a lot of useful information.
- Local planning organizations like Social Planning Councils may have useful data because many of them follow trends in the community.
- Check out local grocery stores to see the size and diversity of their ethnic food sections.
- In rural communities, the post office is often a good source of information.
- Real estate agents and rental or housing registries are often in contact with newcomers to the community.
- Check with new businesses operated by newcomers; check for new cultural groups or new places of worship in the community.
- Go to the local malls and see who is shopping there.
- Ask a variety of community sports associations about participation by newcomers.
- Some local business associations or Chambers of Commerce have useful information.
- Ask political parties, advocacy groups or a variety of community organizations about participation by newcomers.

Where will we go to find out about the way newcomers are participating in our community?

Information Source	Question(s)	Person Who Will Ask the Question(s)

Information from media sources

A check of local media sources, including newspapers, radio and television, is one other way to get a sense of the impact of immigration in the community. Many communities also have a variety of ethnic media sources that cover local issues. You could focus part of the tracking process on monitoring media coverage of newcomer issues over a short period of time: e.g., two to three weeks. Media coverage plays an important part in creating positive or negative perceptions regarding immigration in communities. Involving the local media early on in the planning process is one way to increase their understanding of newcomer issues and to stimulate their active participation in creating the solutions.

How will we monitor our local media sources?

Name of Media Source	Person/Organization Who will Check

Getting the information together

After you have explored the most obvious sources of information, your group might want to ask whether any other information is needed for the planning process. Then you can set a date for everyone to return to the group with the information they have agreed to locate. It is also important to agree in advance on how you will present the information at this meeting. The summary sheets in the next section may help.

WHAT DO WE KNOW NOW?

The next step in the planning process is to summarize the information you have gathered from different sources. There is a danger of getting stalled in a complex analysis of information at this stage. To avoid getting bogged down, it is important to focus on the goals of the planning process and on the information that participants and funders can actually use. Summarize the information you have gathered and note the most common answers to each question. As you go through this process, the priority issues will emerge already ranked.

For this planning process, you will not need to use the answers people give least frequently. This is the time to step back and take a look at the big picture. When you do that, you will be able to see:

- the main issues for newcomers and community organizations.
- the barriers newcomers and others have identified.
- possible solutions.
- settlement trends.
- what is working well now.
- what main issues the community still needs to deal with.

Establishing the context

What or who most helped newcomers to settle in Canada? (Five most frequent answers only)

1. _____
2. _____
3. _____
4. _____
5. _____

What do we know about community participation by newcomers?

1. _____
2. _____
3. _____
4. _____
5. _____

What are the most important trends for the community to take into consideration when making recommendations or developing specific actions?

1. _____
2. _____
3. _____
4. _____
5. _____

What do we know about the funder's future role?

1. _____

2. _____

3. _____

4. _____

5. _____

What do we know about media coverage?

1. _____

2. _____

3. _____

4. _____

5. _____

Identifying priorities

Those who have been involved in planning processes across the country know from experience that the status quo has a great deal of power when people are making decisions about priorities. Change is difficult, especially for agencies and organizations that are feeling overwhelmed by the increasingly complex demands of their clients. Here are a couple of ways to help agencies shift the status quo when it is not serving newcomers adequately.

- Give more weight to information gained from ***direct*** input from newcomers than to any other form of input.
- Use information from sectors other than the settlement sector to obtain a broader community perspective on priorities.

Reminder: Listing the most frequent answers in each of the following categories will result in an unbiased ranking of priorities.

List A The five priority *issues* newcomers have identified:

1. _____

2. _____

3. _____

4. _____

5. _____

List B The five major *issues* that organizations have identified related to newcomers:

1. _____

2. _____

3. _____

4. _____

5. _____

After summarizing the responses in A and B, combine these lists into List C. Here are some suggestions to help with this process.

Step 1 Select issues that are common to both lists as a means of identifying the priority issues for the community and place at the top of List C.

Step 2 Add any remaining newcomer issues in List A to List C.

Step 3 Take out any issues in List B that could become part of the design of solutions to the community's priority issues. (For example, learning English could be a priority issue for newcomers, and lack of space in language classes could be a priority issue for community organizations.)

Step 4 Add any remaining issues in List B to the bottom of List C.

LIST C Priority *issues* that both newcomers and organizations have identified:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Please note that a community might decide not to take action on all of these priorities in one calendar year, but the information will be a valuable yardstick for future planning needs.

Identifying possible solutions to the priority issues

Summarizing the following information will give community planning groups a starting point for identifying actions to tackle the issues they have identified.

The contextual information you have gathered (see pages 15/16, "Establishing the Context") will also help at this stage of the planning process. The planning group will have not only a picture of the overall immigration trends in the community but also an overview of newcomer experiences to set the context for future action. For example, knowing that many recent arrivals received the most help from friends they met through their place of worship, or that a large number of newcomers in a particular neighbourhood are active in the local community centre, provides valuable information about getting access to newcomers and possible activities for them.

The five priority *solutions* newcomers have suggested:

1. _____

2. _____

3. _____

4. _____

5. _____

What would most help organizations to serve newcomers more effectively?

1. _____

2. _____

3. _____

4. _____

5. _____

It is important for everyone in the multi-sectoral planning group to agree on when they have reached a starting place for action. This can happen once the people involved in the planning process have summarized the information they have gathered and developed an overall picture of settlement issues in the community, including ranking the priorities and solutions.

The group needs to recognize that the process of setting priorities is not designed to revamp all services for newcomers and that many issues which do not surface as top priorities will remain important activities for organizations and individuals in the community. The priority-setting process is primarily designed to help funders and communities deal with the difficult trade-offs that are occurring as a result

of changing realities and to find ways of tackling the priority issues that are arising. Problems occur when priority issues take us out of our comfort zone and require us to do something differently. Many people who work in the community are aware of pressures on the system for delivering settlement services and on other sectors in the community such as health and education. They also know that existing organizational structures and funding criteria may prevent organizations from implementing new solutions and different ways of working. At the same time, funders are conscious of the necessity for change in order to maximize dollars or increase effectiveness. Both funders and community organizations believe it is important to accept that they cannot continue trying to do more with less; instead, they need to decide where to focus their priorities and which activities to drop.

Given your summary of the data and the ranked priorities, what overall planning scenarios does your community face with regard to settlement and what are you able to do to deal with the situation?

The following section takes a community into action. It is as important to identify what is already working as it is to identify new actions that you need to take.

What Can We Do?

Once the planning group has agreed on the priorities, you can move on to what you can do, taking each issue one at a time. The following five major questions are designed to assist in funding decisions, future program directions and the multi-sectoral actions needed to tackle your community's settlement issues. You will need one action sheet for each of the priority issues you have identified through the planning process.

People become frustrated if they go through a challenging priority-setting process and in the end realize that very little has actually changed as a result. The following questions are designed to take the group further toward making decisions that will effect real change. The questions will also help funders by providing up-to-date information and by helping many different sectors in the community reach agreement on priority newcomer issues. Knowing these priorities, in turn, will help funders make difficult decisions about what services to fund and will help them to keep their funding and operational criteria relevant to existing realities in the community.

Settlement agency staff told us they might not want to give up a particular program but they would do so if the priority-setting process was fair and open and if they could see the benefits for newcomers. Other sectors such as health, education and employment also felt that identifying priorities and acting collaboratively would help them to deal with the complex realities of trying to serve newcomers more effectively.

What will we recommend to funders as the priority issues needing solutions within our community this year?

Identifying priorities for funders is one of the main goals of this workbook. At this stage of the planning process, when the multi-sectoral group is developing future actions, each funder should receive relevant information about priority issues that will help them to make their decisions. In order to provide this information in an easily useable form, it might be helpful to give the funder copies of the summary lists of priority issues under "Establishing the Context" and "Identifying Priorities," along with a Priority Issue Action Sheet (pages 20/21) for each priority you have identified.

Priority Issue Action Sheet

Issue _____

What does our community already know about this issue?

- The extent of the issue:

_____

_____

_____

- Characteristics of newcomers who are experiencing this issue:

_____

_____

_____

- Major reasons why our community is not tackling this issue adequately:

_____

_____

_____

- Actions our community is already taking to deal with this issue:

_____

_____

_____

- Additional actions we could take under existing organizational mandates and programs:

- We suggest adapting existing programs in the following ways in order to ensure more effective solutions to this issue:

- We suggest cancelling the following programs and redirecting the resources to new activities that will deal with this issue (see below).

- We suggest funding the following new activities in order to deal with this issue:

Using the action sheet analysis might result in funding and program changes such as the following.

Case Study 1

Newcomers and multi-sectoral organizations identified priority issues that became a focus for funding decisions in the following year. For example, the priority-setting process increased community advocacy for employment and skills training programs geared to newcomers, and two ministries agreed to review the issue in order to adapt some of their programs. In addition, two of the settlement agencies agreed in the short term to share space and some administration costs with a view to eventual amalgamation, and another agency worked with the local recreation centre to combine some of their programs.

Case Study 2

As a result of information collected during the student drop-out survey that focused on the students' suggestions for solutions, the School Board targeted funds to implement a number of feasible strategies in two pilot schools. The issue also came to the attention of a settlement agency and a place of worship in the local community which then decided to connect with the parents of the drop-out students. This meeting led to an agreement between the two organizations to combine their resources, with the agreement of the funder, in order to support an ESL program for interested parents.

Which of the issues identified through the planning process can we do something about within current structures and programs?

In some cases, a group of organizations may realistically be able to take only one or two small steps forward toward reaching a collective goal. To achieve even this much progress often means that people have had to put aside turf issues, historical differences, comfort, traditional ways of working, and even fear.

Use the Summary Sheet on page 25 to record issues and actions in response to this question.

Case Study 1

By working together, and with their new community partners, the settlement agencies were able to propose two new strategies to the funder. These strategies were designed to tackle the newcomers' priority issue: the need for various connections to the community to help them settle more quickly. The new strategies required different ways of working within current funding levels. The planning group felt that conducting a broad planning process had created a wider community awareness of and commitment to newcomer settlement.

Case Study 2

As a result of the information-gathering process, students in two of the schools where the drop-out situation was particularly serious made new connections. This led to the establishment of a "buddy" system in the schools and a commitment by two teachers to meet regularly with a group of concerned immigrant students to explore their issues.

Are there priority issues for newcomers which organizations cannot deal with adequately because of existing mandates or funding criteria?

In some communities, cooperation among organizations is not a new experience. These communities would be able to tackle difficult issues that might come forward from the information collected in the planning process—for example, when the issues cross different organizational mandates or lie outside existing funding streams.

Use the Summary Sheet on page 25 to record issues and actions in response to this question.

Case Study 1

Newcomers identified the lack of employment readiness and their inability to transfer their skills as barriers to settling in Canada. The inability to find work has an enormous impact on individuals and families. Newcomers often do not fit the criteria for skills training programs available to EI recipients, for example.

The organizations in the planning group could not take action themselves to tackle this issue but decided they could advocate for and facilitate the first step. One of the settlement agencies, the Employment Centre, and a government representative agreed to:

- *connect with other community organizations and businesses who should be involved.*
- *ask some newcomers who are looking for employment to help find solutions.*
- *talk to other government departments with regard to mandates, funding criteria and funding options.*
- *organize a meeting of all stakeholders with the hope of finding some solutions.*

Case Study 2

The School Board member, two teachers, a principal and the employment counsellor agreed to explore ways in which their systems could adapt to meet both the job needs and the learning needs of potential drop-out students.

Do the issues that newcomers or the community have identified indicate the need for different service priorities, roles, approaches and/or working practices in organizations?

In many instances the information gathered, especially from newcomers, may indicate a need for changes within one or more organizations in order to make them more effective. There will be significant progress at the community level if every organization agrees to make certain changes by a specific date.

Use the Summary Sheet on page 25 to record issues and actions in response to this question.

Case Study 1

Two organizations involved in serving newcomers identified and enacted the following strategies to help connect newcomers to the wider community.

- *They started a volunteer shadowing program with the local Volunteer Bureau. Newcomers began their volunteering by working with an experienced volunteer in order to increase their English language skills, strengthen connections and contribute to the community.*
- *Settlement agencies and the Parks and Recreation Department agreed to give their newcomer clients information on each others' programs. In addition, Recreation staff asked participants in the "Moms and Tots" and "Women's Swimfit" programs if they would be a "buddy" to a newcomer. One of the settlement agencies also facilitated a support group for newcomers at the Recreation Centre because it was in a neighbourhood with an increasing number of new immigrants.*

Case Study 2

One of the guidance counsellors approached a cultural association to offer cross-cultural training of teachers in her school and then began a joint venture between the school and the association.

How will we monitor our results?

The commitment to action needs to include components related to how all the participants will measure their success. Clear strategies for action will lead to clear success measures.

Monitoring the many changes and successes that are occurring throughout the community will help everyone understand what is working and making a difference to the lives of newcomers and will generate a feeling of accomplishment.

Use the Summary Sheet on page 25 to record expected outcomes you will use to monitor your results.

Case Study 1

Monitoring the success of strategies to address newcomers' priority issues would include a mix of quantitative and qualitative outcomes. Here are some examples.

- *Number of newcomers participating in the Volunteer Bureau shadow program*
- *Number of newcomers becoming full-fledged volunteers*

- *Assessment of the volunteer experience by newcomers and experienced volunteers*
- *Newcomers' knowledge of how to get access to settlement agencies and Parks and Recreation programs*
- *Assessments by newcomers and ministry staff of new employment and skills training programs geared to newcomers*
- *Number of newcomers participating in the recreation centre support group and their assessment of the results*

Case Study 2

Here are a few examples of possible quantitative and qualitative outcomes related to actions developed to deal with the student drop-outs.

- *Percentage increase in immigrant students staying in school in the two pilot-project high schools*
- *Students' assessment of the strategies being used in the pilot schools*
- *Number of teachers participating in cross-cultural training*
- *Assessment by teachers and students of the impact of the cross-cutural training*
- *Number of parents participating in the ESL program*
- *Parents' progress in English*
- *Parents' assessment of the program*

Summary Sheet

What actions will we take?

The Issue	The Actions	Expected Outcomes

Ask each person or organization to fill in one or more actions and the expected outcomes and then sign off on their commitment. The combined summary sheets will give an overall picture of the proposed actions. They will also document the results of the planning process and illustrate how far organizations are able to go towards developing better solutions for newcomers in their community.

CELEBRATING PROGRESS

It's time for celebrating a job well done! Given the nature of immigration, planning for newcomers is an ongoing process, and maintaining the contacts made during the planning process will help everyone keep in touch with changing immigration trends and issues. Nevertheless, it is important to have a sense of closure for a specific process. Although information gathering is ongoing, the realities of working with settlement issues mean that a community overview of these issues, such as the one this workbook describes, would probably happen only once a year.

Even though it takes a little more work, community agencies suggest summarizing the planning process in two or three pages, using the completed workbook sections as a guide. This will help everyone with programming and funding decisions and will make the learnings from this process available for planning the next time around. A small summary report could be attached to the action sheet(s) and circulated to everyone in the planning group. Organizations can then send it to funders, distribute it to their boards, staff or administrators, and share it with other organizations.

The summary would end with an assessment by the participants in the planning process. The members of the planning group might answer the following questions.

What worked best for me?

What could we have done differently?

How should we plan and take action in the future?

Appendix A

A possible approach when large numbers of organizations are involved in a planning process

In some cases, a multi-sectoral planning process might involve a large number of organizations. Ideally, every organization should participate as much as possible so that the results of the planning process can benefit from their input. In these circumstances, the planning group might be able to organize a large planning event. The following process, which worked well for three different events in British Columbia, offers a practical approach when large numbers of organizations are involved.

Step 1 Identify all pertinent organizations, using the process in this workbook or your own methods.

Step 2 Group the organizations in clusters of six to eight, using postal codes as the guide.

Step 3 Identify an organization within each cluster that may be prepared to take a lead role. Approach the organization through a telephone call or a personal visit, or use a key person to encourage the organization's participation.

Note: There are two possible ways (A or B) to proceed for Steps 4 through 7.

Process A

Step 4 Give the lead organization the workbook with the "Why plan?" and "Setting goals" sections completed (pages 3/4). Ask the lead organization to call a meeting of the organizations in its cluster by an agreed-upon date.

Step 5 Each cluster of organizations will implement a mini planning process using the workbook as a guide.

Step 6 Each cluster will summarize its results and select a representative to present the results at a large planning event involving all the clusters in the community.

Step 7 At the large planning event, participants will use the results from all the clusters to identify overall priorities and actions and then report the results back to their group.

Process B

Step 4 Ask the lead organization to connect with the other organizations in the cluster and explain the purpose of the planning process and what you hope to achieve. Through a meeting or some other collaborative process, the members of the cluster will agree on someone to represent them at a planning event.

Step 5 The cluster's representative will attend a planning event that implements a process based on the steps in this workbook.

Step 6 The representatives report back to their clusters and get input from those organizations to help complete the information-gathering processes the representatives agreed to in the larger group.

Step 7 The representatives summarize the results from their clusters and present them at a second gathering where the purpose is to to collate all the results and agree on overall priorities and actions.

The processes and tools outlined in this workbook would be appropriate for either method of combining cluster groups with a larger planning event.

Appendix B

Sample invitations to a planning event

Sample guide to the telephone invitation

1. If the invitee is not familiar with your group, include an introduction and some brief background information about your organization.

2. Tell the invitee why you are starting a planning process and what you expect to achieve.

3. Outline reasons why your group wants the invited organization to be part of the planning process and how the invitee might benefit.

4. Ask the invited organization to attend the first planning meeting.

5. If the organization is not able to attend, ask the following questions:

- Would you like to receive the results of the meeting so that you can participate in the future?
- If not, is there any role you would like to play?

If the organization indicates that it is not interested at all, ask why so that the planning group has as much information as possible and can, if warranted, try to turn the situation around.

Sample guide to the written invitation

1. If the invitee is not familiar with your group, include an introduction and some brief background information about your organization.

2. Tell the invitee why you are starting a planning process and what you expect to achieve.

3. Outline reasons why your group wants the invited organization to be part of the planning process and how the invitee might benefit.

4. Ask the invited organization to attend the first planning meeting.

5. For organizations that are not able to attend, provide an opportunity to indicate the organization's desired level of participation in the planning process by including the following questions.

In relation to this planning process, our organization:

____will attend the first meeting

____will participate fully in the planning process

____is not able to attend the first meeting but would like to receive the results

____is not able to participate in the planning process because _____

_____

_____

____would like to participate by _____

_____

_____

____will look at the eventual results of this planning process and reassess our participation at that time

Appendix C

Contact information for immigration trends data

Immigrant Landing Data from Citizenship and Immigration Canada

Electronic Information Services
Citizenship and Immigration Canada
365 Laurier Street West
Ottawa, ON K1A 1L1

Contact: Rick Carlton
Phone: (613) 957-9561
Brian Johnson
Phone: (613) 957-3978
Fax: (613) 954-2208

Citizenship and Immigration Canada publications

Public Affairs
Citizenship and Immigration Canada
365 Laurier Street West
Ottawa, ON K1A 1L1
Phone: (613) 941-7066

Citizenship and Immigration Canada

Website (http://cicnet.ingenia.com)
Information on publications, research, applications, etc.

Provincial Ministries

All provinces have ministries with immigration responsibilities, and you can contact them for information. For example, as of 1997 in British Columbia, the ministry responsible is:

Ministry Responsible for Multiculturalism and Immigration
Immigration Policy Branch
PO Box 9214, Stn. Provincial Government
Victoria, BC V8W 9J1
Phone: (250) 387-7970
Fax: (250) 356-5316

Contact: Rupert Downing, Senior Policy Advisor
Sal Johal, Research Officer

Products: Annual Immigration Profile for British Columbia
Quarterly reports on immigrant landings (*Immigration Highlights*) produced by BC Statistics
Regional profiles of immigrant settlement trends, using Census, landing, ESL, and other data (1997)
Reports and discussion papers on immigration issues (e.g., *Labour Market Integration of Recent Immigrants to BC*)

(Because of changing and different circumstances, other provinces were unable to supply us with contact information)

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- Joint Centre of Excellence for Research on Immigration and Settlement (CERIS) Toronto

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  Phone: (403) 492-6600
  Fax: (403) 492-2595
  E-mail: kmckean@gpu.srv.ualberta.ca

- Immigration et Metropoles, Montreal

  For information, contact:
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  Fax: (514) 343-7078
  E-mail: lamarrep@ere.umontreal.ca

Appendix D

Advisors to the project from across Canada

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